

BID SOLICITATION

Page 1 of 4
Printed: 10/12/2001



STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
CAPITOL HILL
PROVIDENCE RI 02908

BID NUMBER: B00142

TITLE: 1098-T SERVICES

BID OPENING DATE AND TIME:

11/01/2001 10:00 AM

BUYER: JEROME MOYNIHAN

PHONE #: (401) 222 - 2142 ext. 119

BLANKET PERIOD: 1/1/2002 - 12/31/2007

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RELEASE AGAINST RI MPA

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Item	Class-Item	Quantity	Unit	Unit Price	Total
	<p>MASTER PRICE AGREEMENT #298</p> <p>BLANKET REQUIRMENTS: 1/1/02 - 12/31/07</p> <p>BIDDING</p> <p>(a) A single price shall be quoted for each item against which a proposal is submitted. This price will be the maximum in effect during the agreement period. Any price decline at the manufacturer's level shall be reflected in a reduction of the agreement price to the State.</p> <p>(b) Quantities, if any, are estimated only. The agreement shall cover the actual quantities ordering during the period. Deliveries will be billed at the single, firm, awarded unit price quoted regardless of the quantities ordered.</p> <p>(c) Bid price is net F.O.B. destination and shall include inside delivery at no extra cost.</p> <p>(d) Bids for single items and/or a small percentage of total items listed, may, at the State's sole option, be rejected as being non-responsive to the intent of this request.</p> <p>ORDERING</p> <p>(a) The User Agency(s) will submit individual orders for the various items and various quantities as may be required during the agreement period.</p> <p>(b) Exception - Regardless of any agreement resulting from this bid, the State reserves the right to solicit prices separately for any extra large requirements for delivery to specific destinations.</p>				

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DELIVERY: _____

RIVIP VENDOR ID#: _____

TERMS OF PAYMENT: _____

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Item	Class-Item	Quantity	Unit	Unit Price	Total
	<p>STATEWIDE APPLICABILITY - Political Subdivisions (cities, towns, schools, quasi-public agencies), as authorized by law, may participate in this Agreement. All ordering and billing shall be between the vendor and the political subdivision (only).</p> <p>REPORTS - The Vendor agrees to provide the State with quarterly reports describing activity against this Price Agreement. If this is a Master Price Agreement, such reports shall include usage by municipalities, quasi-public agencies, schools, etc. All reports shall contain the following data: (1) Billing volume in dollars and (2) quantity shipped for each line item in the price agreement. When there are no line items in the price agreement, vendor shall report volume by catalog order numbers, with a brief description of each order number.</p> <p>Reports must be submitted to the RI Division of Purchases to the attention BUYER named in this notice, identifying the Agreement number and the Reporting Period. Quarterly reports shall be due 45 calendar days after the end of each quarter. Failure to submit required reports shall be considered a breach of the contractor's obligations and may be considered, at the discretion of the State Purchasing Agent, sufficient cause for the termination of the agreement and other outstanding agreements and orders, and possible suspension from participation in additional State procurements.</p>				
1.0	<p>946-10 TAXPAYER 6050'S IN ACCORDANCE WITH THE TAXPAYERS RELIEF ACT OF 1997 TO PROVIDE 1098-T SERVICES AS SPECIFIED FOR THE UNIVERSITY OF RHODE ISLAND INCLUDING OPTION IDENTIFIED AS #6 ESTIMATED: 22,000 PER YEAR</p>	22000.00	EA		

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2.0	946-10 TAXPAYER 6050'S IN ACCORDANCE WITH THE TAXPAYERS RELIEF ACT OF 1997 TO PROVIDE 1098-T SERVICES AS SPECIFIED FOR THE UNIVERSITY OF RHODE ISLAND EXCLUDING OPTION IDENTIFIED AS #6 ESTIMATED: 22,000 PER YEAR	22000.00	EA		
3.0	946-10 TAXPAYER 6050'S IN ACCORDANCE WITH THE TAXPAYERS RELIEF ACT OF 1997 TO PROVIDE 1098-T SERVICES AS SPECIFIED FOR THE COMMUNITY COLLEGE OF RI INCLUDING OPTION IDENTIFIED AS #6 IN SPECIFICATIONS. ESTIMATED 22,000 PER YEAR	22000.00	EA		
4.0	946-10 TAXPAYER 6050'S IN ACCORDANCE WITH THE TAXPAYERS RELIEF ACT OF 1997 TO PROVIDE 1098-T SERVICES AS SPECIFIED FOR THE COMMUNITY COLLEGE OF RI EXCLUDING OPTION IDENTIFIED AS #6 IN SPECIFICATIONS. ESTIMATED: 22,000 PER YEAR	22000.00	EA		
DESCRIPTIONS OF SERVICES ATTACHED AGENCY CONTACT: EILEEN STINSON (URI) (401) 874-2378 RAY DEANGELIS (CCRI) (401) 825-2196					

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Item	Class-Item	Quantity	Unit	Unit Price	Total
	DELIVERY OF GOODS OR SERVICES AS REQUESTED BY AGENCY.				
				TOTAL:	

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1098-T SERVICES (TAX CREDIT REPORTING)

Full service to comply with the Taxpayer Relief Act of 1997, sections 6050s. Pricing to be submitted by category and as a complete package of services on a per student basis.

Such services to include at a minimum the following categories:

1. Submission of a form 1098-T to every student who has made payment to the University of Rhode Island (22,000 students) during the 2002 calendar year, and subsequent five year period after that date, applicable to semesters commencing after December 31, 2001.

Submission of the form 1098-T to the Internal Revenue Service on or before March 1, 2002.

Submission of the form 1098-T copy on or before February 1, 2002.

Each form 1098-T must include the following:

- School name, address and TIN number
 - Student's name, address and social security number
 - Indicator of 1/2 time status during any 2001/2002 academic period
 - Indicator of student enrolled exclusively in a program leading to a graduate degree
 - Name, address and telephone number of a contact person
 - The student document should include a brief description of the law and a reference to the appropriate IRS publications.
2. A fully staffed call center to respond to the anticipated telephone inquiries. The contact number and name printed on the form 1098-T must link to the call center. The call center must provide information on the terms of the Act and related IRS regulations to taxpayers, students and schools. However, legal and tax advice is not to be provided.
 3. Web site for students to obtain financial information.
 4. Process returned mail.
 5. Process amended returns.

6. Optional: Provide statement of account to all students by semester for the University of Rhode Island students: The statement must include the following:

All fees assessed and clearly identifying which fees are includable for the tax credits; all payments received during the 2001 calendar year identifying includable payments and identifying excludable payments, i.e.; scholarships and tuition waivers. These transactions will be clearly identified by the school to the reporting entity. Indicate web site access to TRA/97 tax information on form 1098-T.

Other

The University must have a direct link to a Company contact person to promptly resolve reporting issues.

Provide a pre-mailing notice to individuals informing them of the new reporting and filing requirements before January 15, 2002.

All information provided by the school must be held in strictest confidence and used solely for purposes identified on this document.

Terms subject to regulatory changes.

Blanket period: January 1, 2002 through December 31, 2007.